Santa Fe Advisors

Job Posting – Administrative Assistant

Administrative Assistant

The Administrative Assistant ('AA') will work with Santa Fe Advisors ('SFA') partners and staff to service and grow our client base. Responsibilities will include (but not be limited to): office administration, phone and mailing management, greeting office visitors and clients, event management, record-keeping, administration of new and maintenance of current client relationships and special projects. Thorough administrative work, timely client service and proactive internal teamwork are the main priorities at SFA. The Administrative Assistant will be an important member of a small entrepreneurial team and is expected to be flexible and adaptable.

Act with the highest integrity and ethical standards. Represent SFA effectively and positively in the community. Put clients' best interests first, maintain client and firm confidentiality, and be a trusted partner to other members of the SFA team. AA will be active in the community and strive to build relationships that will grow SFA's reputation and business.

Background and Skills

- Adept with computers, networked drives, navigating software systems, client relationship management systems, and Microsoft Office products including Excel, Word, PowerPoint, and Adobe
- Enjoy working with people in a service capacity
- Ability to work with colleagues to build a successful team
- Work independently with minimal supervision
- Clear and accurate verbal and written communication skills
- Desire to grow a business and work in an entrepreneurial environment
- Attention to detail including follow-up to complete tasks and projects

Benefits

- Non-Exempt/Hourly
- 30 - 40 hours per week
- Medical insurance coverage for employees 100% paid by SFA
- Generous paid vacation and office holidays.
- Paid sick leave

About Santa Fe Advisors

We provide investment management and financial planning services to high-net-worth individuals and families, trusts, institutions, and charitable organizations. The firm was founded in 2014 and is 100% employee-owned. Our firm's core principles are based on serving our clients' best interests through a detailed understanding of their personal and financial needs and goals. As fiduciaries to our clients, we focus on a high degree of transparency and aligning our interests with those of our clients. The principals and employees personally invest in the same portfolios that we recommend for our clients.